Ross Business Development, Inc.
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TRACS Access QuickStart

Types of Users

There are two types of Internet users: **Coordinators** and **Users**. The Coordinator serves as the property's Executive Director's representative in controlling access to the system and performing other system administration functions. The Coordinator controls which Users have access to review or submit data.

Each management company must designate a Coordinator, typically an employee, to act as their representative in providing system access to Users. The Coordinator is then responsible for retrieving a user ID for the User, establishing the User's role in the system, assigning the User to the properties, and providing the User with their user ID.

A Coordinator can also serve as a User for a property. Therefore, if an individual will be responsible for system administration and will also view data, the individual should register as a Coordinator.

Although a User can review data (e.g., financial or management), they cannot control access to the system. A User depends on the Coordinator for the necessary system rights to prepare, review, or submit data.

TRACS data is available to those coordinators and users who have some property responsibility related to the certification of residents or the submission and monitoring of property vouchers. In order to effectively manage the TRACS submission process, owner/agents are required to monitor activity recorded in the TRACS database.

This document provides "quick" step-by-step instruction explaining how to set up TRACS access.

#1 - Obtain a coordinator M-ID (an ID must be obtained for **each** coordinator and **each** user), activate the business partner relationship for all properties and set up roles, actions and property assignments. For additional information about obtaining access to Secure Systems, which includes APPS, REMS, REAC and EIV (as well as other HUD databases), you can refer to HUD's Secure Connection and Secure Systems User Manual at www.hud.gov/offices/reac/products/wass/files/000qreference.pdf.

For further guidance and information about applying for a WASS ID or WASS Coordinator Role, contact the Real Estate Assessment Center (REAC) Technical Assistance Center (TAC) team at 1-888-245-4860. **(Please note that the people who make up the REAC TAC (WASS) team are NOT the same people who make up the Multi-family help desk team.)**

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If you already have a coordinator M-ID, and are assigned to the properties for which you want to act as the EIV Coordinator, then you can move on to step 2.

If you have a ***user*** ID and not a ***coordinator*** ID, and you are going to be the EIV coordinator, you must upgrade the user ID to a coordinator ID before you can become the EIV Coordinator (you do not have to be a coordinator to access EIV data only to grant access rights to other users). To upgrade your ID, you must fax a letter to the attention of WASS at 202-485-0280 providing the user's name, M-ID, the owner entity tax ID, and ask to be upgraded to a WASS Coordinator. The letter must be on company letterhead and signed by the owner.

#2 The coordinator must complete the setup for his/her ID before the coordinator can begin setting up users. Follow the steps below to obtain TRACS and iMAX access for the coordinator.

For the Coordinator:

A. Log in to Secure Systems
B. Go to User Maintenance
C. Enter your MID
D. Click Find User. Your information will appear.
E. Click on the arrow next to the drop down menu at the bottom of the dialogue box
F. Choose the option "Maintain User Actions"
G. See if the TRACS Actions are checked. If not, go ahead and check them
H. Click Submit
I. Confirm your choices
J. You should return to your User Maintenance screen
K. Click on the arrow next to the drop down menu at the bottom of the dialogue box
L. Choose the option "Maintain User Roles"
M. DO NOT MODIFYANY EIV SETTINGS
N. Check the iMAX option
O. Click on the checkbox next to the iMAX option so that there is a check in the box
P. Click on the checkbox next to the TRACS Voucher and Certifications options so that there is a check in the box
Q. Click Submit

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R. Confirm your choices
S. You should return to your user information
T. Click on the arrow next to the drop down menu at the bottom of the dialogue box
U. Choose the option "Property Assignment Maintenance"
V. Your MID should default in the proper field at the top of the screen (if not, enter your MID)
W. Click submit
X. A list of roles should appear at the top of the screen
Y. Highlight all roles as appropriate
Z. A list of properties should appear at the bottom of the screen
AA. Highlight all properties as appropriate
BB. Click submit
CC. Confirm your choices
DD. Return to the Secure Systems Main Menu
EE. You should see a TRACS Option and an iMAX option
FF. Click on the integrated Multi-family Access Exchange System (iMAX) link **or** the Tenant Rental Assistance Certification Link The Rules of Behavior (ROB) page should appear automatically. (both of these systems share the same ROB so it only has to be completed once per year)
GG. Review the Rules of Behavior
HH. Accept or Return to the Secure Systems Main Menu
II. If you accepted the TRACS Rules of Behavior, print the ROB
JJ. Sign and date the ROB
KK. Maintain the ROB in a file to be available to HUD or HUD's reviewers upon request (usually during the Management & Occupancy Review)

NOTE: *Signed TRACS Rules of Behavior and Security Awareness Training Certificates are subject to review and audit at any time by HUD staff and/or HUD's representatives with oversight and monitoring responsibilities, and must be available upon request.*

#3 All coordinators must complete the TRACS Security Awareness Training. If you send TRACS files you are required to take Security Awareness Training annually as mandated by the Federal Information Security Management Act (FISMA) and Office of Management and Budget (OMB) Circular A-130. New rules were initially announced April 2, 2010 via HUD's TRACS Announcements page at www.hud.gov/offices/hsg/mfh/trx/announcements.pdf .

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To complete online TRACS Security Awareness training:

- *Open your web browser*
- *Go to* ***http://iase.disa.mil/eta/index.html#onlinetraining***
- *Click on the* ***Federal ISS Awareness*** *icon on the IA Education, Training and Awareness screen*
- *Click on* ***Launch New Information Systems Security Awareness*** *on the Information Systems Security Awareness V 3.0 screen*
- *Proceed with the training*
- *You must* ***complete all areas*** *to finish the course. It takes about an hour to an hour and one-half to complete the course.*
- *Upon course completion you will be prompted to print a certificate confirming you completed the course. If you are unable to print the certificate, press Alt + Print Screen, open a word document, right click, paste, print, sign and file the certificate.*
- *You must sign and file the certificate*

The deadlines for complying with the TRACS requirements is October 1, 2010. After that date, Management and Occupancy Review (MOR) Reviewers may ask you for copies executed Rules of Behavior for anyone who transmits TRACS files using iMAX or who access TRACS Queries in HUD's Secure Systems. You can obtain a new TRACS Rules of Behavior form from HUD's TRACS web site at www.hud.gov/offices/hsg/mfh/trx/trxdocs.cfm. If you did not print a copy of the ROB when you accessed the TRACS system:

1. *Print a new copy*
2. *Sign it and*
3. *Keep it on file so that you can provide it to HUD or your CA upon request*

You must have a signed ROB for all employees who send TRACS files or who access the TRACS Queries from HUD's Secure Systems.

#4 Once Coordinator setup is complete, the coordinator can establish access for individual users. Follow the steps below to establish TRACS and iMAX access for individual users.

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For the User:

A. Log in to Secure Systems
B. Go to User Maintenance
C. Enter the User's MID
D. Click Find User
E. The User's information will appear
F. Click on the arrow next to the drop down menu at the bottom of the dialogue box
G. Choose the option "Maintain User Actions"
H. See if the TRACS Action is checked. If not, go ahead and check it
I. Click Submit
J. Confirm your choices
K. You should return to your User Maintenance screen
L. Click on the arrow next to the drop down menu at the bottom of the dialogue box
M. Choose the option "Maintain User Roles"
N. Click on the checkbox next to the iMAX option so that there is a check in the box
O. Click on the checkbox next to the TRACS Voucher and Certifications options so that there is a check in the box
P. Click Submit
Q. Confirm your choices
R. You should return to the user's information
S. Click on the arrow next to the drop down menu at the bottom of the dialogue box
T. Choose the option "Property Assignment Maintenance"
U. The user's MID should default in the proper field at the top of the screen (if not, enter the user's MID)
V. Click submit
W. A list of roles should appear at the top of the screen
X. Highlight roles as appropriate
Y. A list of properties should appear at the bottom of the screen
Z. Highlight properties as appropriate
AA. Click submit
BB. Confirm your choices
CC. Return to the Secure Systems Main Menu

At this point, TRACS setup for this user is complete. The final steps must be performed by the user.

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DD. When the User logs on to Secure Systems (he/she) should see a TRACS Option and an iMAX option

EE. The user must click on the integrated Multi-family Access Exchange System (iMAX) link **or** the Tenant Rental Assistance Certification Link (both of these systems share the same ROB so it only has to be completed once per year)

FF. The user must review the Rules of Behavior

GG. The user must Accept or Return to the Secure Systems Main Menu

HH. If the user accepted the TRACS Rules of Behavior, the user must print the ROB

II. The user must sign and date the ROB

JJ. Maintain the ROB in a file to be available to HUD or HUD's agents upon request (usually during the Management & Occupancy Review)

NOTE: *Signed TRACS Rules of Behavior and Security Awareness Training Certificates are subject to review and audit at any time by HUD staff and/or HUD's representatives with oversight and monitoring responsibilities, and must be available upon request. The deadlines for complying with the TRACS requirements is October 1, 2010. After that date, Management and Occupancy Review (MOR) Reviewers may ask you for copies executed Rules of Behavior for anyone who transmits TRACS files using iMAX or who access TRACS Queries in HUD's Secure Systems.*

You can obtain a new TRACS Rules of Behavior form from HUD's TRACS web site at http://www.hud.gov/offices/hsg/mfh/trx/trxdocs.cfm.

#5 All users and coordinators must complete the TRACS Security Awareness Training. If you send TRACS files you are required to take Security Awareness Training annually as mandated by the Federal Information Security Management Act (FISMA) and Office of Management and Budget (OMB) Circular A-130. New rules were initially announced April 2, 2010 via HUD's TRACS Announcements page at www.hud.gov/offices/hsg/mfh/trx/announcements.pdf .

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